DISCOVERY.net

By:

Education Solutions Development, Inc.

User Manual

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Visit our web site at **www.esd-sys.com**

I.   Contents

II.   Introduction to System

Welcome to the DISCOVERY.Net student administration system. Through years of learning experience and client support, ESD in collaboration with DB Soft Inc., designed and created this highly efficient system to help school districts track student demographics, enrollment, grades, attendance, discipline, course details and other pertinent school-related information on-line. Just like the existing Discovery K-12 student administration system, the system's very flexible and user-friendly functions provide the school administrators, teachers, counselors, deans and other school personnel a means to better serve its students.

The functions of the **DISCOVERY.net** system is grouped into two as follows:

- **K12**

  This provides links to different modules in the system that creates and maintains all school-related information. The system allows you to:

  - Track grades, attendance, student enrollment, course information and student demographics.

  - Generate a variety of standard and customized reports in the areas of student demographics, attendance, grades, discipline, schedules and enrollment.

  - Access medical histories, activity information and discipline data for every student in the district.

  - Build a master schedule and an accompanying student scheduler that automates the scheduling process.

  - View demographic records across the district while maintaining security and data integrity.

- **System Administration**

  This provides links to modules in the system that maintains the pages in the application and its security rights. The system's powerful and flexible security options only allow users with access to the primary school of the students to edit demographic records. Its screen-level security also restricts users from specific functions of the system for data integrity.

III.   Getting Started

To start DISCOVERY.Net System:

- In your Internet Browser, specify the following URL address:
  http://develop.dbsoft.com/discovery/

- A logon page appears where you must specify a valid User Name and Password and select the District to gain access to DISCOVERY.net system.

- If you do not have access rights to the system, contact the System's Administrator.

1   Login Information

The Login Information page allows you to log into the system.

Figure 1.1 Login page

1.1   User ID
Indicates the logon user's valid identification into the system. You must specify a User ID before clicking logging into the system. Otherwise, the page displays "User ID is required."

1.2   Password
Indicates the logon user's valid password. Passwords are encrypted upon entry. You must specify a password before logging into the system. Otherwise, the page displays "Password is required."

1.3   District

Indicates the District School where the logon user resides. The default value displayed is the district school. You must select a district before logging into the system. Otherwise, the page displays "District is required."

1.4   Change Password on login

A checkbox that indicates whether you want to change your password upon login. Select this checkbox before logging in to the system to display the Change Password page.

1.5   Login

Click [LOGIN] to log into the system.

Clicking [LOGIN] performs the following validations:

- User ID and Password must exist in the database. Otherwise, the page displays "User ID or Password not found. Please try again."

- User must be active to access the system. Otherwise, the page displays "User is deactivated. Please contact your system administrator."

- User must have access rights to any school in the District to access the system. Otherwise, the page displays "You are not authorized to log on the system. Please contact your system administrator."

2   Change Password

The Change Password page allows you to specify a new login password.

Figure 2.1 Change Password page

2.1 Enter New Password

Indicates the new login password. You must specify a new password before saving. Otherwise, the page displays "New Password is required."

2.2 Verify New Password

Indicates the verified password. You must retype the same password specified on the Enter New Password field before saving. Otherwise, the page displays "Verify Password is required."

2.3 Save

Click [SAVE] to post modification of password into the database.

Clicking [SAVE] performs the following validations:

- New Password must contain at least 5 but not greater than 10 characters. Otherwise, the page displays "New Password must be at least 5 but not greater than 10 characters."

- New and Verify Passwords must match. Otherwise, the page displays "New Password and Verify Password must match."

IV.   The Environment

An understanding of the environment and the controls used is invaluable to every user of the system. Very often this comes by experience and becomes intuition, but for the record it's here for your reference.

1   Controls

1.1   Buttons
Buttons are used to execute commands or open lookup windows and are referenced in the documentation by using square brackets (e.g. [SAVE]). (All key codes in the documentation are in UPPERCASE).

1.2   Labels
Labels describe field or selection. A red asterisk on the label's left side indicates that you must input or specify a value into the field it describes before you can proceed with processing or saving.

1.3   Fields
Fields hold information such as text, numbers or dates. They are displayed as rectangles on the screen. You can move forward through the fields by using the TAB key or move backwards by using the SHIFT + TAB keys.

To ensure data integrity of records, the application has standard validation messages depending on what you specify on the fields.

Fields that only accept numeric entries are called numeric fields. You must specify numeric characters for these fields. Otherwise, the page displays "<numeric field label> must be numeric."

Fields followed by a date picker icon are called date fields. Entries for these fields should follow the MM/DD/YYYY format and should be valid dates. Otherwise, the page displays "Invalid <date field label>, please enter in format MM/DD/YYYY." You must also specify a date that is within MSS limit (01/01/1753 and 12/31/2050). Otherwise, the page displays "<date field label> cannot be prior to 01/01/1753." or "<date field label> cannot be later than 12/31/2050."

1.4 Checkboxes

Small square box preceded/followed by a description which allows you to toggle the option on or off. ('Select a checkbox' refers to marking or tagging a checkbox while 'Clear a checkbox' refers to unmarking or deselecting a checkbox.)

1.5 Option Groups

Set of options, from which the user can choose only one.

1.6 Dropdown List Box

A field that has a button associated with it. Click button to display the list of choices. The field displays the available options.

1.7 Multi-select list boxes

This has two list boxes for the Available and Selected groups. The Available group lists all the available options while the Selected group lists all the options that have already been selected. You may move the options to and from the Available or Selected groups by clicking the Left ([<]) or Right ([>]) Arrow buttons.

1.8 Edit box

Allows the user to enter non-formatted text and numbers in paragraph style.

1.9   Grid

Displays information in table format. Information in a grid maybe available for edit or display only.

1.10   Rows

Indicates the number of rows displayed in a grid.

Rows 1 - 5 of 5

1.11   Pagination

Group of links that allows the user to navigate through the pages in a grid.

Top | Previous | 1 2 3 4 5 | Next | Bottom

Selection	Description
Top	Displays the first page.
Previous	Displays the previous set of pages.
1 2 3 4 5	Displays the page number depending on the number link clicked. If '3' is clicked then Page 3 is displayed.
Next	Displays the next set of pages.
Bottom	Displays the last page.

1.12   Date Picker

Opens a pop-up calendar window wherein the user may select a specific date.
To use the Date Picker, you must click the Date Picker icon ( ).

Selection	Description
[≥]	Jump ahead one month.
[≤]	Jump back one month.
[≥≥]	Jump ahead one year.
[≤≤]	Jump back one year.
[Print]	Generates a hard copy of the calendar displayed on screen.
24 25 26 27 28 29 30	Select a date link to select a date.

1.13 Links

Links are underlined text in this application. When the mouse pointer is put over a link, the mouse pointer changes to a hand pointer to indicate that an action will be done when it is clicked.

Two things may happen when this is clicked. Basically, when the link clicked is a column header in a grid, records are sorted by the column header link clicked. Otherwise, it opens connections to other pages in the application.

1.14 Spyglass Icon

Opens the Student Search window, which displays a list of students. It displays information such as Student ID and Student Name. You can make your choice by simply clicking the left mouse button over the selected student record.

1.15 Lookup window

A separate page opened in another window that displays a list of choices. It displays information such as code, name, and description, etc. You can make your choice by simply clicking the left mouse button over the selected record.

A lookup window may also contain selection or information such as notes on a specific record.

1.16 Mouse

The mouse (if available) allows the user the freedom of moving around the screen and 'clicking' choice options. ('Clicking' refers to pressing the buttons on the mouse, while the arrow/cursor is over an option)

1.17 Window

A rectangular area on your screen that displays the page.

1.18 Page

An area on your screen in which you view an application.

1.19 Scroll Bar

Horizontal or vertical bars are used to scroll the display in order to show sections of the screen that are not visible.

1.20 Required Field Indicator

This is a red asterisk displayed at the bottom-left of the page to indicate that there are required fields in the page.

* - Required Field

1.21 Project Header

A rectangular area located at the upper portion of all pages within the application. The Project Header includes name of the project, logon user and login date, and related links such as Help and Logout. Help link displays on-line help while Logout link reverts to Login page.

Logged in: JOHN SMITH   Tuesday April 19, 2005

DISCOVERY.net   version 1.0.0.38923   Help   Logout

1.22   Page Title

A rectangular area on your screen located below the Project Header. The Page Title displays the Project Title and School information such as the name of the District, Year and Term. The Page Title changes depending on the current page displayed.

When in the Main Menu page, School is displayed as a dropdown list box.

When the modules of the application are accessed, aside from the School dropdown list box, the Year, Track and Term of the selected school are also displayed in a dropdown list box labeled as Parameters.

1.23   School Parameter

A dropdown list box located at the right portion of a page title. This list displays different schools in a district you have access. You may change the school without logging out by simply selecting a school form the list.

1.24   Parameters

A dropdown list box located at the right portion of a page title. This list displays different Year, Track, and Term of the selected school. You may change the selected Year, Track and Term anytime in the system.

1.25   Module

This is an index of the modules in the system. Each module groups the functions available in the system.

1.26   Sub Module/Page

This is links of sub modules or pages under a module which when clicked displays a page in the application.

Search | Primary Info | Additional Info | Contacts | Address List | Phone List | Health / Doctor | Medical Details | Immunization | Activity | Fees | International |
Alternate Names | Address Search | Group Medical | Group Activity | Reports | Batch

1.27   Student Header

This is a section at the top of a page below the sub module/page links that displays the primary details of the selected student. There are two student headers available in the application depending on the necessity of the student details displayed.

Some pages only display the student's name, identification number, and year in school for the logon school. When the selected student is not enrolled in the logon school, asterisks (**) are displayed for year in school instead. Moreover, 'Med*' and 'Rel*' indicators are displayed in the student header. The 'Med*' indicator is displayed if emergency codes are set for the selected student. While the 'Rel*' indicator, is displayed when the selected student is not allowed to be released to any of the student's contacts.

| | Student Name: | Smith, John M. - 11 ▼ | ID: 8517914 | YIS: 11 Med* Rel* |

Some pages, on the other hand also displays the student's birth date, assigned homeroom and counselor in addition to the student's name, identification number and year in school.

| | Student Name: | Smith, John M. - 11 ▼ | ID: 8517914 | YIS: 11 |
| Birth Date: 01/05/1980 | | | Homeroom: HMRM1 | Counselor: 12000945 |

Both student headers, also allows you to locate currently enrolled students in the logon school. You may locate students by specifying the student's name (last name, first name) on the text box at the left side of the student header. Or you may specify the student's ID on the text box at the right side of the student header. The system automatically locates matching records upon tab out on these fields. Specified student name or student ID must exist and be currently enrolled in the logon school and term.

When student name is specified, all matching student records are displayed in the Student Name dropdown list box. You may select an option from the list to select and activate the student. However, if there are no records retrieved, the page displays "There were no matching records found for the criteria specified."

When student ID is specified, matching student record automatically becomes the selected or active student. However, if there are no records retrieved, the page displays "Student ID <student ID> not found."

1.28   Footer Search

Some pages in the application have a mini search function located at the bottom or footer of the page that is commonly referenced to as the footer search. You may select the criterion from the dropdown list box at the left and specify the data to be located in the text box at the right. You may opt to locate records starting with or containing the criteria specified by selecting an option from the dropdown list box in the middle. Click [SEARCH] to locate records.

| * - Required Field | ID ▾ | Starts with ▾ | 1 | Search | | Save | Delete | Clear | Menu |

2   Commands

The process done by the following buttons is executed by using the mouse; or you can press TAB to access the button then press ENTER or SPACEBAR. However, only buttons at the bottom of the page (footer buttons) are accessible by pressing TAB key. Other buttons in the page are only executed by clicking the mouse.

2.1   Help
Displays on-line help.

2.2   Logout
Reverts to Login page.

2.3   Menu
Reverts to Main Menu page. If modifications are made on an entry page and you click [MENU], the page displays "Discard changes?" with [OK] and [CANCEL] options. Click [OK] to discard modifications and revert to Main Menu page. Click [CANCEL] to remain on current page.

2.4   Close
Closes the current page and return to the previous page. This is usually available for Lookup windows in which case focus returns to the main page/window.

2.5   Back
Reverts to previous page. If modifications are made on an entry page and you click [BACK], the page displays "Discard changes?" with [OK] and [CANCEL] options. Click [OK] to discard modifications and revert to the previous page. Click [CANCEL] to remain on current page.

2.6   Cancel
Disregards modifications made. Leaves the current page/window and return to the previous page/window.

2.7   Clear
Clears the entries that have been made on the current page and restores the display to its original state. If modifications are made on an entry page and you click [CLEAR], the page displays "Discard changes?" with [OK] and [CANCEL] options. Click [OK] to proceed with clearing the entries. Click [CANCEL] to cancel clearing of entries.

2.8   Save

Posts your modifications on the record into the database. The page displays 'Save successful." upon successful saving of your modifications.

2.9   Delete

Removes selected record(s) from the database. There must be records retrieved for the module before deleting records. Otherwise, the page displays "No records to delete." From the retrieved records, you must select record(s) to delete. Otherwise, the page displays "Please select a record to delete." Upon clicking [DELETE] and record(s) have already been selected, the page displays a delete confirmation message. When the button clicked is located at the bottom of the page (footer button), the page displays "Are you sure you want to delete?" Otherwise, the page displays "Are you sure you want to delete the selected record(s)?" Both messages have [OK] and [CANCEL] options. Selecting [OK] proceeds with deleting the selected record(s). Selecting [CANCEL] returns to the current page and cancels deletion. The page displays 'Delete successful." upon successful deletion of the record(s).

2.10   Delete Rows

Temporarily removes the selected record(s) from the grid. You must select a record to delete before clicking [DELETE ROWS]. Otherwise the page displays "Please select a record to delete."

2.11   Add Rows

Inserts the specified number of rows in the grid. You must specify a value in the Add Rows field before clicking [ADD ROWS]. Also, a maximum of 10 rows may be added at once. Otherwise, the page displays "Add rows cannot be less than 1 and greater than 10."

2.12   Preview

Generates a preview of the report that matches the criteria specified.

2.13   Submit

Submits the batch process using the batch parameters specified.

3   Security Rights

Each user who has access to the system is given security rights. This identifies your level of access of the modules in the system for data integrity purposes. Consequently, availability of buttons, links, and fields in a page may vary depending on your security rights.

There are four levels of security access that may be assigned to you: No Access, Read, Update, and Override access.

3.1 No Access

You are not allowed to view the page when you have 'No Access' security rights. In this case, the link of the page is not available.

3.2 Read

When you are given 'Read' access rights to a page, you are only allowed to view record details. However, modification of data or adding new records is not allowed. In this case, the fields in the page are unavailable for edit and buttons, such as [ADD], [SAVE], and [DELETE] are hidden to limit you from processing records.

3.3 Update

'Update' access rights allow you to modify and add new records. However, you are not permitted to delete records. In this case, the fields are available for edit as well as buttons for processing records except for the [DELETE] button.

3.4 Override

When you have 'Override' access rights to a page, you are given full access wherein you are allowed to view, modify, and delete records. In this case, all the fields are available for edit as well as all the buttons for processing records including [DELETE].

The level of security access rights given to you are divided into two groups: District and School levels. The security rights assigned to you in the School level are always in effect. In addition to this, your security rights in the District level allows you to read, update, and delete records in other schools within the district you have access.

4   Search Criteria

Search Criteria contains information that the application uses during a search to locate the data you want.

Your search criteria can be designed to be as general or specific as you like. A general search usually produces a long list of items while a specific search may only find one or two items. The Search Criteria screens allow you to create a search that best suits your needs. Each criterion field refers to a field from the source data. By entering a value in a criterion field, you are instructing the application to search for only those records in the source data with a corresponding field that matches what you have specified.

The following example demonstrates how the same criteria can produce a variety of results:

Criteria	Results

roy	roy
	royal
	royce

r	ray
	rey
	reyes

Exact *	roy

* Available in most cases.

4.1   Search

You must click [SEARCH] to locate records that matched the criteria specified. In most of the search screens, you must specify at least one criterion before searching.   Otherwise, the page displays "At least one criterion should be entered." The program searches the source data to locate any records that meet the criteria. The application then displays a list of matching entries. If no records matched the criteria specified, the page displays "There were no matching records found for the criteria specified." However, if more than 500 records are located from the database for the criteria specified, the page displays "The result set returned more than 500 records. Please make your search more specific." In this case, you must specify other criteria to trim down the search result.

There are screens in the application that have default values set for the search criteria. In this case, the matching records are already displayed on screen upon access of the page. Whenever the criteria are changed, you must always search for its matching records before making changes on the displayed records. Otherwise, the page displays "Please click [SEARCH] before making any modifications.

5   Search Results

The Search Results are displayed after a search is conducted. The following items are generally displayed together with the record. Items displayed are those found by the search.

5.1   Rows

The number of records found upon search that match the criteria specified.

5.2   Detail

In most cases you can access detailed information about each of the items in the list. The user may click a specific link in any of the records retrieved in order to view or edit details of a specific record.

5.3   Pagination

Displayed depending on the number of records retrieved. This allows you to view all records on the list.

5.4   Add
[ADD] displays a page where the user may enter information in adding a new record.

6   Other Criteria

The Other Criteria page of either a batch file process or report allows you to specify the students included in the report. You may specify the student ID or the student attributes like YIS, Enrollment Standing, Family ID, Birth Date, Physical Exam Date, Gender, Ethnicity, LEP, Homeroom, Counselor, Advisor, Attendance Category Code, Lunch Status Code, Primary School of Enrollment and Team of the students you want to include in the report or batch file process. However, some of the criteria are only available in the page depending on its necessity in the report or batch file process. You may also indicate the primary and secondary sorting of the records retrieved in the report or included in the batch file process.

Del.	Student ID	Student Name
☐		
☐	9414566 🔍	JONES, MARCO
☐	9436893 🔍	SMITH, LANEY

[Delete Rows]   [Add Rows] ☐

YIS:

Available	Selected
00 - KINDERGARTEN / 02 - SECOND GRADE / 03 - THIRD GRADE / 04 - FOURTH GRADE / 05 - FIFTH GRADE	01 - FIRST GRADE

Enrollment Standing:

Available	Selected
E - Enrolled / N - Not Enrolled

Start Family ID: [_____]   End Family ID: [_____]
Start Birth Date: [_____] 📅   End Birth Date: [_____] 📅
Start Physical Exam Date: [_____] 📅   End Physical Exam Date: [_____] 📅

Gender:

Available	Selected
F - FEMALE / N - UNDETERMINED / O - OTHER GENDER	M - MALE

Ethnicity:

Available	Selected
B - AFRICAN AMERICAN / C - CAUCASIAN/WHITE / ENG - British / H - HISPANIC/SPANISH / I - AMERICAN INDIAN/ALASKA

Homeroom:

Available	Selected
ALGEB - STUDY OF ALGEBRA / ART - ART CLASSES (SPECIA / COOK - COOKING GOURMET N / DICT - IMPROVING SPEECH AN / ENG - English as a Second Lar	BIO - ADVANCED BIOLOGY CONC

Counselor:

Available	Selected
1002478 - MCALLISTER-WALL / 12005315 - JOHNSON, JILL

Advisor:

Available	Selected
12000211 - ANDERSON. JACK / 12011200 - GARELL, LILY	12001199 - BONE, DAN

Attendance Category Code:

Available	Selected
D - DEFAULT / I - INELIGIBLE / T - TRANSFER	H - HALF DAY

Lunch Status Code:

Available	Selected
R - REDUCED

Primary School of Enrollment:

Available	Selected
330 - WILLIAMSONN ELEMENT	33079 - GMHC SCHOOL

Team:

Available	Selected
AA - All American Scholar / GENTM - General Team / REG - Regular Students / SPED - Special Education Team	HNR - Honor Team

Primary Sort:
[Student Name ▼]

[Back] [Preview] [Clear] [Menu]

Figure 6.1 Other Criteria page

6.1   Student List
The Student List allows you to specify the student IDs of the students to be included in the report or batch file process.

6.1.1   Del.
A checkbox that indicates whether a record is marked for deletion or not. You may mark all records for deletion by selecting the Del. column header checkbox. To mark a specific record, just select the Del. checkbox beside the record to be deleted.

6.1.2   Student ID
Indicates the unique identification number assigned to the student. You may manually specify a student ID or select from the Student Search by clicking the spyglass icon beside the field. (Please refer to Lookup Window, Chapter 26 for details on Student Search window.)

6.1.3   Student Name
Indicates the name of the student. Student name is displayed when you select a student from Student Search window or upon submitting, when you manually specify the student ID in batch file processes. In reports, this field remains blank if the student ID is manually specified.

6.2   YIS
A multi-select list box that indicates the year in school of the students to be included in the report or batch file process. You may select YIS from the list.

6.3   Enrollment Standing
A multi-select list box that indicates the enrollment standing of the students to be included in the report or batch file process. You may select Enrollment Standing from the list.

6.4   Start Family ID / End Family ID
Indicates the identification number assigned to the family of the students to be included in the report or batch file process. Specifying the Family ID range includes all the students with Family ID within the specified Start Family ID and End Family ID. When you have entries on both fields, the End Family ID must be greater than the Start Family ID. Otherwise, the page displays "End Family ID cannot be less than Start Family ID."

6.5   Start Birth Date / End Birth Date

Indicates the date of birth of the students to be included in the report or batch file process. Specifying the date range includes all the students with date of birth within the specified Start Birth Date and End Birth Date. You may manually specify a date in mm/dd/yyyy format or select from the Date Picker Calendar by clicking the Calendar icon beside the date field. When you have entries on both fields, the End Birth Date must be later than the Start Birth Date. Otherwise, the page displays End Birth Date cannot be prior to Start Birth Date."

6.6   Start Physical Exam Date / End Physical Exam Date

Indicates the physical exam date of the students to be included in the report or batch file process. Specifying the date range includes all the students with physical exam date within the specified Start Physical Exam Date and End Physical Exam Date. You may manually specify a date in mm/dd/yyyy format or select from the Date Picker Calendar by clicking the Calendar icon beside the date field. When you have entries on both fields, the End Physical Exam Date must be later than the Start Physical Exam Date. Otherwise, the page displays End Birth Date cannot be prior to Start Birth Date."

6.7   Gender

A multi-select list box that indicates the gender of the students to be included in the report or batch file process. You may select Gender from the list.

6.8   Ethnicity

A multi-select list box that indicates the ethnicity of the students to be included in the report or batch file process. You may select Ethnicity from the list.

6.9   Homeroom

A multi-select list box that indicates the homeroom group of the students to be included in the report or batch file process. You may select Homeroom from the list.

6.10   LEP

A multi-select list box that indicates the level of english proficiency of the students to be included in the report or batch file process. You may select LEP from the list.

6.11   Counselor

A multi-select list box that indicates the name of the counselor of the students to be included in the report or batch file process. You may select Counselor from the list.

6.12   Advisor

A multi-select list box that indicates the name of the advisor of the students to be included in the report or batch file process. You may select Advisor from the list.

6.13   Attendance Category Code

A multi-select list box that indicates the attendance category of the students to be included in the report or batch file process. You may select Attendance Category Code from the list.

6.14   Lunch Status Code

A multi-select list box that indicates the lunch status assigned to the students to be included in the report or batch file process. You may select Lunch Status Code from the list.

6.15   Primary School of Enrollment

A multi-select list box that indicates the primary school of enrollment of the students to be included in the report or batch file process. You may select school from the list.

6.16   Team

A multi-select list box that indicates the team of the students to be included in the report or batch file process. You may select Team from the list.

7   Batch Criteria

The Batch Criteria page allows you to specify the criteria to be used in processing the batch file. You may also view, modify and save a batch file process criteria. Aside from this, the page also facilitates scheduling a regular processing of a batch file.

The Batch Criteria page consists of three (3) sections: Batch Parameter – Criteria Name, Batch Criteria/Parameters, and the Scheduler.

7.1   Batch Parameter Criteria Name

The Criteria Name section of the page allows you to specify the name of the batch file criteria and to indicate if the batch with the specified batch criteria is to be saved into the database. You may also opt to generate an output of the batch file process in MS Excel format.

BATCH PARAMETER ▪ Criteria Name			
Criteria Name	BAT_ATT_UPDATE_PARAM	☐ Save Criteria Name	☐ Add .xls output

Figure 7.1.1 Criteria Name

7.1.1   Criteria Name

Indicates the name of the criteria. You may specify a new criteria name or you may select an existing batch criteria name by clicking [CRITERIA NAME] to open Criteria Name Search window where you may select an existing batch file criteria to process. (Please refer to Lookup Window, Chapter 9 for details on Criteria Name Search window.)

7.1.2 Save Criteria Name

A checkbox that indicates whether the batch file criteria are to be saved or not.

7.1.3 Add .xls output

A checkbox that indicates whether a file in MS Excel format is to be created for the generated report or not.

7.2 Batch Criteria/Parameters

The Batch Criteria/Parameters section allows you to specify the criteria specific to the batch file process. (Pls. refer to K12 for details on the Batch Criteria/Parameters in each module.)

7.3 Scheduler

The Scheduler section of the page allows you to specify the schedule you want the batch file to be processed. You may also set a regular schedule to run the batch file.

Figure 7.3.1 Scheduler

7.3.1 Start Date

Indicates the start date the batch file is to be processed. You may manually specify a date in mm/dd/yyyy format or select from the Date Picker Calendar by clicking the Calendar icon beside the date field. You must specify Start Date before submitting. Otherwise, the page displays "Start Date is required."

7.3.2 Time

A series of dropdown list boxes that indicate the time the batch file is to be processed.

- The first dropdown list box indicates the hour part of the time the batch file is to be processed. Options are from '01 - 12'.

- The second dropdown list box indicates the minute part of the time the batch file is to be processed. Options are from '00-59.'

- The third dropdown list box indicates the seconds part of the time the batch file is to be processed. Options are from '00-59.'

- The fourth dropdown list box indicates the part of the day the batch file is to be processed. Options are 'AM' and 'PM'

7.3.3 Scheduled

A checkbox that indicates whether the batch file process is to be run according to the schedule specified. Selecting this field enables the Occurs section.

7.3.4 Occurs

The Occurs section of the page allows you to set the schedule the batch file is to be processed using the same batch criteria.

You may set the regular schedule of the batch file to be processed by any of the following: Daily, Weekly or Monthly.

7.3.4.1 Daily

An option button, if selected allows you to specify how often in days the batch file is to be processed.

Figure 7.3.4.1.1 Scheduler - Daily

a. Every

A dropdown list box that indicates how often in days the batch file is to be processed.

7.3.4.2 Weekly

An option button, if selected allows you to specify how often in weeks the batch file is to be processed.

You may also select the day of the week the batch is to be run. To select the day of the week, just click the option button beside the day of the week you want the batch file to be processed.

Figure 7.3.4.2.1 Scheduler - Weekly

> **a. Every**
>
> A dropdown list box that indicates how often in weeks the batch file is to be processed.
>
> **b. Day of the week**
>
> A series of option buttons that indicate the day of week the batch file is to be processed.

7.3.4.3 Monthly

An option button, if selected allows you to specify what day and how often in months the batch file is to be processed.

You may set the monthly schedule of the batch file process using the two (2) dropdown list boxes.

- The first dropdown list box indicates the day in the month the batch file is to be processed.

- The second dropdown list box indicates how often in months the batch file is to be processed.

Figure 7.3.4.3.1 Scheduler - Monthly

7.4 Submit

Click [SUBMIT] to initiate the batch process. Clicking [SUBMIT] also saves the Criteria Name if the Save Criteria Name is selected.

8 Batch Status

The Batch Status page allows you to keep track of the status of the processing of the batch file. You may also view the batch criteria and the report generated by the batch file process.

This page consists of two sections: Search Criteria and Search Result sections.

Figure 8.1 Batch Status page

8.1 Search Criteria

The Search Criteria section allows you to specify criteria needed to locate batch file submitted.

8.1.1 Run Date

Indicates the run date of the batch to be located. You may manually specify a date in mm/dd/yyyy format or select from the Date Picker Calendar by clicking the Calendar icon beside the field.

8.1.2 Status

A dropdown list box that indicates the status of the batch file process to be located. Status may be Cancelled, Cancel Request, Complete, Error, In Progress, Pending or Starting Process. You may select one status from the list.

8.1.3 Queue ID

Indicates the unique queue identification number of the batch file process to be located.

8.1.4 Batch Name

A dropdown list box that indicates the name of the batch file process to be located. You may select one batch name from the list.

8.2 Search Result

The List section allows you to view the batch criteria submitted, keep track of the status of the batch process and download the generated report of the batch file process. This section details the identification, batch name, operator, status, run date, process date, end date, and the report of the batch file process.

Clicking the column header link on this section sorts the displayed records by the name of the link clicked. For example, clicking the Batch Name column header link sorts displayed records by batch name.

8.2.1   ID

Indicates the unique queue identification number assigned to the batch file process.

Click [ID] to open the Criteria Lookup window where you may view the batch criteria submitted for the selected batch file process. All the fields are display-only and cannot be modified. (Please refer to Lookup Window, Chapter 8 for details on Criteria Lookup window.)

8.2.2   Batch Name

Indicates the name of the batch file process.

8.2.3   Op

Indicates the user name of the operator of the batch file process.

8.2.4   Status

Indicates the current status of the batch file process. The following are the valid batch process status.

8.2.4.1   Cancelled

A cancelled batch file process has a Cancelled status.

8.2.4.2   Cancel Request

A batch file process that is cancelled by the user has a Cancel Request status. Cancel Request status eventually become Cancelled.

8.2.4.3   Complete

A completed batch file process has a Complete status.

8.2.4.4   Error

A batch file process with an error has an Error status.

8.2.4.5   In Progress

A batch file that is still processing has an In Progress status.

8.2.4.6   Pending

A batch file that is waiting to be processed has a Pending status.

8.2.4.7   Starting Process

A batch file process that has just been submitted or run has a Starting Process status.

Click [STATUS] to open the Status Search window where you can keep track of the status of the batch file process in detail. (Please refer to Lookup Window, Chapter 25 for details on Status Search window.)

8.2.5   Run Date

Indicates the date and time the batch file is processed.

8.2.6   Process Date

Indicates the date and time the batch file is processed.

8.2.7   End Date

Indicates the date and time the batch file process is completed or cancelled.

8.2.8   Report

Indicates if there is a report generated for the batch file process.

Click [YES] to open the Report Search window where you may view and download the generated report. (Please refer to Lookup Window, Chapter 21 for details on Report Search window.)

8.3   Search

Click [SEARCH] to locate the batch file processes that matched the criteria specified.

8.4   Cancel

Click [CANCEL] to terminate the processing of the selected batch file. A cancel confirmation message, "You are about to change the status of Job <ID> from <Status> to 'Cancel Request'. Continue?" is displayed upon clicking [CANCEL]. Click [OK] to proceed with the cancellation of the batch file. Otherwise, click [CANCEL] to revert to the Batch Status page.

Clicking [CANCEL] also checks the validity of canceling the batch file process.

- You may not cancel a batch file with a Completed status. Otherwise, the page displays "Job <ID> has already finished execution."

- You may not cancel a batch file with a Cancelled Status. Otherwise, the page displays "Job <ID> already cancelled."

V.   K12

The K12 group maintains all school-related information including the student's demographics, school and course enrollment, schedules, attendance, grades, progress, transcript, and transfer details. You may also manage the courses in the schools within the district and the discipline and testing information of the students. Moreover, you may define the dictionary of records that are used throughout the application.

K12 consists of the following modules:

- Demographics

- Enrollment

- Course

- Grades

- Schedules

- Progress

- Attendance

- Transcript

- Discipline

- Testing

- Transfer

- Special Services

- Group Entry

- Admin

- Registration

- Reports

- Batch

VI. SYSTEM ADMINISTRATION

The System Administration group maintains the default information used to enable the effective utilization of the system's features and functions. The modules and pages in Discovery.Net system depend on the information maintained in the System Administration group. Therefore, it is important that information entered in this module is accurate. The System Administration module consists of the following:

System Administration consists of the following modules:

- Menu Maintenance

- Group Maintenance

- User Maintenance

- Maintenance Controls

1   Menu Maintenance

The Menu Maintenance module allows you to manage the menus used in the system. You may view how the menus are organized in the system through the tree list. You may also create or modify the menu details and move their location as necessary.

The Menu Maintenance module consists of two pages:

- Details

- Items

1.1   Details

The Details page allows you to create menus and define the hierarchy and order they should follow. This page also allows you to modify existing menus and make changes on their arrangement.

This page consists of two sections: Tree List and Details sections.

Figure 1.1.1 Details page

1.1.1 Tree List

The Tree List section contains the nodes that represent the modules that are used in the system. Click on the symbol beside the node to expand or collapse the list. Clicking on a [+] symbol expands the list and displays the submodules or pages, while clicking on a [–] symbol collapses the list. Click on the node itself to display its details on the Details section.

1.1.2 Details

The Details section allows you to view the details of the currently selected menu.

1.1.2.1 Menu ID

Indicates the unique identification number assigned to the menu.

1.1.2.2 Item

Indicates the name of the page and its corresponding URL. For new menu records, you must specify an item before saving. Otherwise, the page displays "Item is required."

You may only specify an item by selecting a menu record from the Menu Items Search window. Click [ADD] to make [ITEM] available. Consequently, click [ITEM] to open the Menu Items Search window. (Please refer to Lookup Window, Chapter 14 for details on Menu Items Search window.) This button is unavailable for existing menu record.

1.1.2.3   Node Sequence

Indicates the number that represents the placement of the node in the sequence.

1.1.2.4   Parent Sequence

Indicates the number that represents the placement of the current node's parent in the sequence.

1.1.2.5   Deactive Date

Indicates the deactivation date of the menu. You may select from the Date Picker Calendar by clicking the Calendar icon beside the date field.

1.1.3   Prior

Click [PRIOR] to move the selected menu item one level higher. This button is only available when a node is selected.

Clicking [PRIOR] also performs the following validation:

- The selected menu must not be a root node or in the highest level. Otherwise, the page displays "Root nodes cannot be moved using PRIOR."

1.1.4   Next

Click [NEXT] to move the selected menu item one level lower to its preceding sibling. This button is only available when a node is selected.

Clicking [NEXT] performs the following validation:

- The selected menu must have a preceding sibling without a URL. Otherwise, the page displays "Node cannot be moved using NEXT if its preceding sibling has a URL."

1.1.5   Up

Click [UP] to move the selected menu item one sequence higher. This button is only available when a node is selected.

Clicking [UP] performs the following validation:

- The selected menu item must not be at the top of the sequence. Otherwise, the page displays "Node cannot be moved using UP if it has no preceding sibling."

1.1.6   Down

Click [DOWN] to move the selected menu item one sequence lower. This button is only available when a node is selected.

Clicking [DOWN] also performs the following validation:

- The selected menu item must not be at the bottom of the sequence. Otherwise, the page displays "Node cannot be moved using DOWN if it has no succeeding sibling."

1.1.7   Move

Click [MOVE] to move the location of the selected menu item as a child of the next menu to be selected.   This button is only available when a node is selected. After clicking [MOVE], you must select the destination menu to complete the process.

Clicking [MOVE] performs the following validations:

- If the next selected menu item is already the parent of the current item, the page displays "A Node cannot be moved into its parent."

- If the next selected menu item is the current item itself, the page displays "A node can only be moved into another location.."

- If a node is successfully moved to another location, the page displays "Move successful."

1.1.8   Cancel Move

Click [CANCEL MOVE] to cancel moving a node to another location. This button is only displayed and available upon clicking [MOVE].

1.1.9   Add

Click [ADD] to add a new menu item into the menu list.

1.1.10   Preview

Click [PREVIEW] to open the Menu Items Preview window where you may view the tree list in full. (Please refer to Lookup Window, Chapter 14 for details on Menu Items Preview window.)

1.1.11   Delete

Click [DELETE] to remove the selected menu item from the tree list. This button is only available when a node is selected.

1.1.12 Save

Click [SAVE] to add the new menu item or post modifications made on the menu record into the database. Clicking [SAVE] also displays the new menu record into the tree list. This button is only available when a node is selected or upon [ADD].

1.2 Items

The Items page allows you to locate menu items used in the system using footer search. This page also allows you to view, add, modify and delete details of the menu items.

This page consists of two sections: Details and Search Result sections.

Figure 1.2.1 Items page

1.2.1 Details

The Details section allows you to modify the details of a menu item record used in the system.

1.2.1.1   ID

Indicates the unique identification number assigned to the menu item. The system automatically generates an ID for a newly created menu.

1.2.1.2   Description

Indicates the description of the menu item. You must specify a description before saving. Otherwise, the page displays "Description is required."

1.2.1.3   Page Name

Indicates the name of the page corresponding the menu item.

1.2.1.4   URL

Indicates the URL of assigned to the menu item.

1.2.1.5   Notes

Indicates any remarks or additional information about the menu item.

1.2.1.6   Display

Indicates how the item is to be displayed. Options are 'Treelist' and 'Tabview'. Selecting 'Treelist' displays the menu as a tree list. Selecting 'Tabview', on the other hand, displays the menu as a tab.

1.2.2   Search Result

The Search Result section displays the primary details of the menu item. This section details the ID, description, page name, and URL of the menu items. Clicking the column header link sorts displayed records by the name of the link clicked. For example, clicking the Description column header link sorts displayed records by description.

You may select a menu item record by doing any of the following:

- By clicking the ID link on the first column of the record you want to view or modify.

- By double-clicking on the menu item record you want to view or modify.

1.2.3   Save

Click [SAVE] to add the new menu item or post modifications made on an existing menu item into the database.

1.2.4   Delete

Click [DELETE] to remove the selected menu item from the database.

2   Group Maintenance

The Group Maintenance module facilitates in maintaining the security access rights assigned to users in a group according to school or district requirements. The System Administrator manages the security rights given to each group.

The Group Maintenance module consists of three sections: Details, Security Rights, and Special Security sections.

Figure 2.1 Group Maintenance page

2.1   Details

The Details section allows you to select a function groups for the security assignment. This section also allows you to modify the name of a group. Groups are used to categorize the users of the system and easily assign their security rights in accessing the system. System Administrators could be assigned in a single group, Instructors can be assigned in another group, Students in another group, and so on.

2.1.1   Group ID

A drop down list box that indicates the unique identification number of the function groups available in the system. You must select a group ID from the list to set the group's security rights on the menu items.

This field is unavailable when adding new function groups. The system automatically generates an ID for a newly created function group.

2.1.2   Group Name

Indicates the name assigned to the Group ID selected. You must specify a Group Name before saving. Otherwise, the page displays "Group Name is required."

2.2   Security Rights

The Security Rights section allows you to specify the group's security rights for each menu item in the system. You may select a specific node in the tree list that corresponds to a page in the system and assign the district and school access rights of the function group. (Please refer to The Environment, Chapter 3 for details on Security Rights.)

2.2.1   Tree List

The Tree List section contains the nodes that represent the modules that are used in the system. Click on the symbol beside the node to expand or collapse the list. Clicking on a [+] symbol expands the list and displays the submodules or pages, while clicking on a [–] symbol collapses the list. Click on the node itself to display the security rights assigned to the selected function group for the menu item.

2.1.3   Menu Selected

Indicates the name of the current menu item selected from the tree list.

2.2.3   Menu Access

A checkbox that indicates whether the group is given access rights to the selected menu item or not. If a child node from the tree list is given menu access, its corresponding parent node is automatically given menu access and vice versa. However, if a child node's menu access is cleared, the menu access of its parent node will not get affected, unless the parent node only possess that single child node. On the other hand, if a parent node menu access is cleared, all child nodes under the parent node will also be cleared of its access.

2.1.4   District Security Rights

A dropdown list box that indicates the security rights in the district level given to the selected group for a specific menu item. Options are 'No Access', 'Read', 'Update', and 'Override'.

2.1.4.1   No Access

Indicates that users in the group have no access to the menu item.

2.1.4.2   Read

Indicates that users in the group can locate and view records in the district level. However, adding or updating records are not allowed.

2.1.4.3   Update

Indicates that users in the group, aside from locating and viewing records, are also allowed to update records in the district. However, users are not permitted to delete records.

2.1.4.4   Override

Indicates that users in the group have full access to the records. They may locate, view, modify and delete records in the district.

2.1.5   School Security Rights

A dropdown list box that indicates the security rights in the school level given to the selected group for a specific menu item. Options are 'No Access', 'Read', 'Update', and 'Override'.

2.1.5.1   No Access

Indicates that users in the group have no access to the menu item.

2.1.5.2   Read

Indicates that users in the group can locate and view records in the school level. However, adding or updating records are not allowed.

2.1.5.3   Update

Indicates that users in the group, aside from locating and viewing records, are also allowed to update records in the logon school. However, users are not permitted to delete records.

2.1.5.4   Override

Indicates that users in the group have full access to the records. They may locate, view, modify and delete records in the logon school.

2.3 Special Security

The Special Security section allows you to specify which reports and batch processes may be accessed by the users in a function group. This is usually used for the Reports, Batch List, and Batch Status pages.

2.3.1 Special Security

Indicates the module reports/ batch process which users in the selected function group may have special security access to.

2.3.2 Access

A checkbox that indicates whether the users in the selected function group have access to the corresponding module reports/batch process or not.

2.4 Save

Click [SAVE] to add a new function group or post modifications made on the security rights of an existing function group into the database.

Clicking [SAVE] performs the following validation:

* Group Name must be unique for each function group record. Otherwise, the page displays "Group Name already exists."

2.5 Add

Click [ADD] to add a new function group.

2.6 Clone

Click [CLONE] to create a new function group copying the security rights details of the currently selected function group. This button is unavailable when adding a new function group.

2.7 Delete

Click [DELETE] to remove selected function group and its security rights from the database. This button is unavailable when adding a new function group.

3 User Maintenance

The User Maintenance module facilitates in maintaining the users who may access the system. You may locate, view, add, and delete user accounts. You may also modify details of user accounts such as user's name, password setup, function groups, and accessible school years. You may also assign a person to the user that serves as his identification when logging into the system.

The User Maintenance module consists of two pages: Search and the Details pages.

3.1   Search

The Search page allows you to locate existing users of the system or add new user accounts.

This page consists of two sections: Search Criteria and List sections.

Figure 3.1.1 User Maintenance – Search page

3.1.1   Search Criteria

The Search Criteria section allows you to specify criteria needed to locate user accounts from the database.

3.1.1.1   Option

A set of option buttons that indicate the criterion to be used in locating user account records. Options are 'User Name' and 'Last Name'. Selecting 'User Name' indicates that specified name is to be matched against the user names of the user account records in the database. Selecting 'Last Name', on the other hand, indicates that specified name is to be matched against the last name of the user account records in the database.

3.1.1.2   Name

Indicates the name of the user account record to be located. You must specify a name before locating records. Otherwise, the page displays "Name is required."

3.1.2 List

The List section displays the primary details of the user account records This section details the user name, first name, and last name of the user account records. Clicking the column header link sorts displayed records by the name of the link clicked. For example, clicking the First Name column header link sorts displayed records by first name.

You may select a user account record by doing any of the following:

- By clicking the User Name link on the first column of the record you want to view or modify.

- By double-clicking on the user account record you want to view or modify.

3.1.3 Search

Click [SEARCH] to locate user account records that matched the criteria specified.

3.1.4 Add

Click [ADD] to open the Details page where you may add a new user account record.

3.2 Details

The Details page allows you to define the specific details of a user account such as name, email address and password. You may also specify the person assigned to the user, which school years he has access and to what function group the user belongs which identifies his security access of the pages in the system.

This page consists of two sections: Details and Member of Groups sections.

Figure 3.2.1 User Maintenance – Details page

3.2.1 Details

The Details section allows you to specify details of a user account record.

3.2.1.1 User Name

Indicates the user name of the user that is used when logging in to the system. This field is unavailable for existing records. You must specify a user name before saving. Otherwise, the page displays "User Name is required."

3.2.1.2 Short Name

Indicates the short name of the user. A Short Name may be used as a substitute when displaying the logon user's name.

3.2.1.3   First Name

Indicates the first name of the user. This field is unavailable if a person is assigned to the user account record. You must specify a first name before saving. Otherwise, the page displays "First Name is required."

3.2.1.4   Last Name

Indicates the last name of the user. This field is unavailable if a person is assigned to the user account record. You must specify a last name before saving. Otherwise, the page displays "Last Name is required."

3.2.1.5   Person ID

Indicates the unique identification number of the person assigned to the user account. Click [PERSON ID] to open the Person Search window where you may select a person for the user account. (Please refer to Lookup Window, Chapter 17 for details on Person Search window.) This button is unavailable when a person is already assigned to the user account.

3.2.1.6   Access Type

A dropdown list box that indicates the access type of the user. Options are 'All' and 'Specific'.

a. **All**

Indicates that the user (instructor) is allowed access to student records, particularly attendance, regardless of whether they are enrolled in his classes or not.

b. **Specific**

Indicates that the user (instructor) is only allowed to access records, particularly attendance, of the students enrolled in his class.

3.2.1.7   Email Address

Indicates the email address of the user.

3.2.1.8   Password

Indicates the password of the user in logging into the system. You must specify a password for the user. Otherwise, the page displays "Password is required."

3.2.1.9   Confirm Password

Indicates the password of the user that should match the entry in the password field. You must specify a confirm password if password is specified. Otherwise, the page displays "Confirm Password is required."

3.2.1.10   Year From – To

Indicates the range of the school year the user has access to. You must specify the school year range before saving. Otherwise, the page displays "Year From is required." or "Year To is required."

3.2.1.11   Deactivate

A checkbox that indicates whether the user is active or not.

3.2.1.12   Document Approval by Email

A checkbox that indicates whether the user is able to accept approval emails or not.

3.2.2   Member of Groups

The Member of Groups section displays all function groups existing in system. This section allows you to assign which function group(s) the user belongs and whether or not he has access to the district/institution or to what particular schools in the district.

3.2.2.1   Group Name

Indicates the name of the function groups available in system.

3.2.2.2   Institution Access

A checkbox that indicates whether user has access to all schools in the institution/district or not.

3.2.2.3   School Access

Indicates the schools in the institution/district the user has access to. Click [SCHOOLS] to open the School Access window where you may select the schools to assign to the user. (Please refer to Lookup Window, Chapter 30 for details on School Access window.) This button is unavailable when user has Institution Access.

3.2.3   Save

Click [SAVE] to add a new user account record or post modifications made on the details of the user account record into the database.

Clicking [SAVE] performs the following validations:

- User Name entered must be unique. Otherwise, the page displays "User Name <username> already exists."

- Password must be composed of five to ten characters. Otherwise, the page displays "Password must be at least 5 but not greater than 10 characters."

- Confirm Password must be composed of five to ten characters. Otherwise, the page displays "Confirm Password must be at least 5 but not greater than 10 characters."

- Password and Confirm Password of the user must be the same. Otherwise, the page displays "Password and Confirm Password must match."

- Year To must be later than Year From. Otherwise, the page displays "Year To cannot be prior to Year From."

3.2.4   Delete

Click [DELETE] to remove the selected user account records from the database.

4   Maintenance Controls

The Maintenance Controls module allows you to manage specific information about static and code tables used throughout the system.

The Maintenance Controls module consists of two sections: Details and Search Results sections.

Figure 4.1 Maintenance Controls

4.1 Details

The Details section allows you to add a table in the maintenance control or modify the table information of a record.

4.1.1 Table Name

Indicates the name of the table. You must specify a table name before saving. Otherwise, the page displays "Table Name is required."

4.1.2 Description

Indicates the description of the table used in the code table. You must specify a description before saving. Otherwise, the page displays "Description is required."

4.1.3 DISCOVERY Module

A dropdown list box that indicates the group in the system under which the code table is displayed. You must select the discovery module before saving. Otherwise, the page displays "DISCOVERY Module is required."

4.1.4 Static

A checkbox that indicates whether the table is static or not. Static tables are not displayed in the code table.

4.1.5 URL

Indicates the URL corresponding the code table. You must specify a URL before saving. Otherwise, the page displays "URL is required."

4.2 List

The List section displays the information of the table in the maintenance control. This section details the table name, description, discovery module, static table indicator, and page URL of the static or code table records. Clicking the column header link sorts displayed records by the name of the link clicked. For example, clicking the Description column header link sorts displayed records by description.

You may select a table record by doing any of the following:

- By clicking the Table Name link on the first column of the record you want to view or modify.

- By double-clicking on the table record you want to view or modify.

4.3 Save

Click [SAVE] to add the table in the maintenance control or post modifications made on the table record into the database.

Clicking [SAVE] performs the following validations:

- The combination of Table Name and Discovery Module must be unique for each code table record. Otherwise, the page displays "Table Name <table name> and Module <module> already exists."

- Table Name must be a valid table in the database. Otherwise, the page displays "Table Name <table name> does not exist."

4.4 Delete

Click [DELETE] to remove the selected table record from the database.

VI. Lookup Window

1   Academic Field Search

The Academic Field Search window allows you to locate academic field(s) that matches the criteria specified.

This window consists of two sections: Search Criteria and Search Results sections.

Figure 1.1 Academic Field Search window

1.1   Search Criteria
The Search Criteria section allows you to specify criteria needed to locate existing academic field records from the database.

6.1.1   Code
Indicates the code of the academic field record to be located.

1.1.2   Description
Indicates the description of the academic field record to be located.

6.2   Search Result
The Search Result section details the code and description of the academic field records that match the criteria specified. Clicking the column header link sorts displayed records by the name of the link clicked. For example, clicking Description column header link sorts displayed records by description.

You may select an academic field record and display it on the field in the parent page by doing any of the following:

- By clicking the Code link on the first column of the academic field record you want to select.

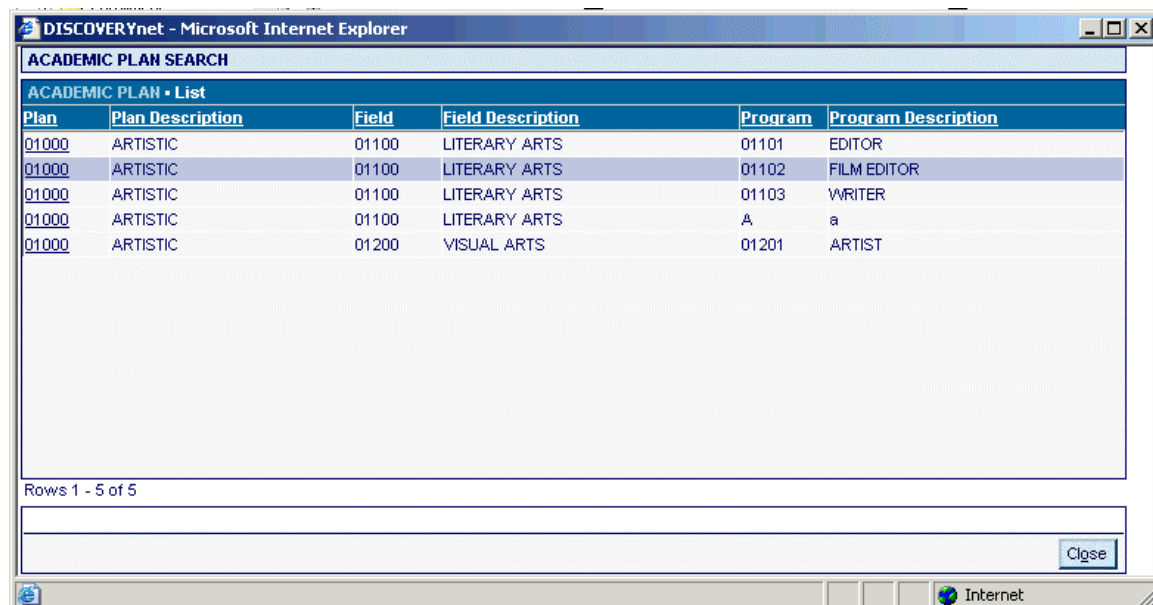- By double-clicking the academic field record you want to select.

6.3   Search
Click [SEARCH] to locate academic field records that match the criteria specified.

2   Academic Plan Search (Admin)

The Academic Plan Search window in Admin > Academic Planning > Academic Field page allows you to locate academic plan(s) that matches the criteria specified.

This window consists of two sections: Search Criteria and Search Results sections.

Figure 2.1 Academic Plan Search (Admin) window

2.1   Search Criteria
The Search Criteria section allows you to specify criteria needed to locate existing academic plan records from the database.

2.1.1   Code
Indicates the code of the academic plan record to be located.

2.1.2   Description
Indicates the description of the academic plan record to be located.

2.2   Search Result
The Search Result section details the code and description of the academic plan records that match the criteria specified. Clicking the column header link sorts displayed records by the name of the link clicked. For example, clicking Description column header link sorts displayed records by description.

You may select an academic plan record and display it on the field in the parent page by doing any of the following:

- By clicking the Code link on the first column of the academic plan record you want to select.

- By double-clicking the academic plan record you want to select.

2.3   Search
Click [SEARCH] to locate academic plan records that match the criteria specified.

3   Academic Plan Search (Transcript)

The Academic Plan Search window in Transcript > Academic Plan page allows you to locate academic plan(s) with corresponding academic fields and programs. The window details academic plan code and description, academic field code and description, and academic program code and description.

You may select an academic plan record and display it on the field in the parent page by doing any of the following:

- By clicking the Code link on the first column of the academic plan record you want to select.

- By double-clicking the academic plan record you want to select.

Plan	Plan Description	Field	Field Description	Program	Program Description
01000	ARTISTIC	01100	LITERARY ARTS	01101	EDITOR
01000	ARTISTIC	01100	LITERARY ARTS	01102	FILM EDITOR
01000	ARTISTIC	01100	LITERARY ARTS	01103	WRITER
01000	ARTISTIC	01100	LITERARY ARTS	A	a
01000	ARTISTIC	01200	VISUAL ARTS	01201	ARTIST

Rows 1 - 5 of 5

Figure 3.1 Academic Plan Search (Transcript) window

4   Add Tardy

The Add Tardy window allows you to save tardy records of the student for the particular day. The window automatically computes the number of minutes the student is tardy based on the school day start and time in specified.

Figure 4.1 Add Tardy window

4.1   School Day Start

Indicates the time the school day starts.

4.2   Time In

Indicates the time the student came to class.

4.3   Minutes Tardy

Indicates the number of minutes the student is late for the class. This field is automatically computed based on the school day start and time in of the student.

4.4   OK

Click [OK] to add tardy record or post modifications made on an existing tardy record of the selected student into the database.

Clicking [OK] also performs the following validations:

- School Day Start must be valid and in correct format. Otherwise, the page displays "School Day Start should be in format HH:MM[AM/PM].

- Time In must be valid and in correct format. Otherwise, the page displays "Time In should be in format HH:MM[AM/PM]."

5   Address Reorder

The Address Reorder window displays all the available addresses of the persons related to the student. This window also allows you to modify the order of the addresses. It details the address type and the complete address of the person.

Figure 5.1 Address Reorder window

5.1   Save
Click [SAVE] to post modifications made on the order of addresses.

5.2   Up
Click [UP] to move the address record one step up from its previous location.

5.3   Down
Click [Down] to move the address record one step down from its original position.

6   Block Search

The Block Search window allows you to locate block code(s) that matches the criteria specified.

This window consists of two sections: Search Criteria and Search Results sections.

Figure 6.1 Block Search window

6.1   Search Criteria

The Search Criteria section allows you to specify criteria needed to locate existing block code records from the database.

6.1.1   House No.

Indicates the house number of the block record to be located.

6.1.2   Street Name

Indicates the street name of the block record to be located.

6.1.3   Street Direction

Indicates the street direction of the block record to be located.

6.1.4   Block Code

Indicates the code of the block record to be located.

6.1.5   Zip

Indicates the zip code of the block record to be located.

6.2 Search Result

The Search Result section details the block code and description, low and high number for the house no., street name and direction, zip code, and list of schools of the block records that match the criteria specified. Clicking the column header link sorts displayed records by the name of the link clicked. For example, clicking Block Code column header link sorts displayed records by block code.

You may select a block record and display it on the field in the parent page by doing any of the following:

- By clicking the Block Code link on the first column of the block record you want to select.

- By double-clicking the block record you want to select.

6.3 Search

Click [SEARCH] to locate block records that match the criteria specified.

6.4 Ok

Clicking [OK] allows you to continue saving the entered information on the new address record of the student if valid. Otherwise, the address record is validated.

6.5 Cancel

Clicking [CANCEL] closes the Block Search window and returns to the Primary Info page without saving the new address information.

7 Course Search

The Course Search window allows you to locate course(s) with corresponding IDs and titles that matches the criteria specified.

This window consists of two sections: Search Criteria and Search Results sections.

Figure 7.1 Course Search window

7.1   Search Criteria

The Search Criteria section allows you to specify criteria needed to locate existing course master records from the database.

7.1.1   Course ID

Indicates the unique ID assigned to the course to be located.

7.1.2   Course Title

Indicates the title of the course to be located.

7.2   Search Result

The Search Result section details the ID and title of the course master records that match the criteria specified. Clicking the column header link sorts displayed records by the name of the link clicked. For example, clicking Course ID column header link sorts displayed records by course ID.

You may select a course master record and display it on the field in the parent page by doing any of the following:

- By clicking the Course ID link on the first column of the course master record you want to select.

- By double-clicking the course master record you want to select.

7.3   Search
Click [SEARCH] to locate course master records that match the criteria specified.

8   Criteria Lookup

The Criteria Lookup window allows you to view the criteria you specified when processing a batch job.

Figure 8.1 Criteria Lookup window

9   Criteria Name Search

The Criteria Name Search window displays all criteria name you saved when executing the batch process with corresponding date when the record is created. Clicking the column header link sorts displayed records by the name of the link clicked. For example, clicking Criteria Name column header link sorts displayed records by criteria name.

You may select a criteria name record and display it on the field in the parent page by doing any of the following:

- By clicking the Criteria Name link on the first column of the batch criteria record you want to select.

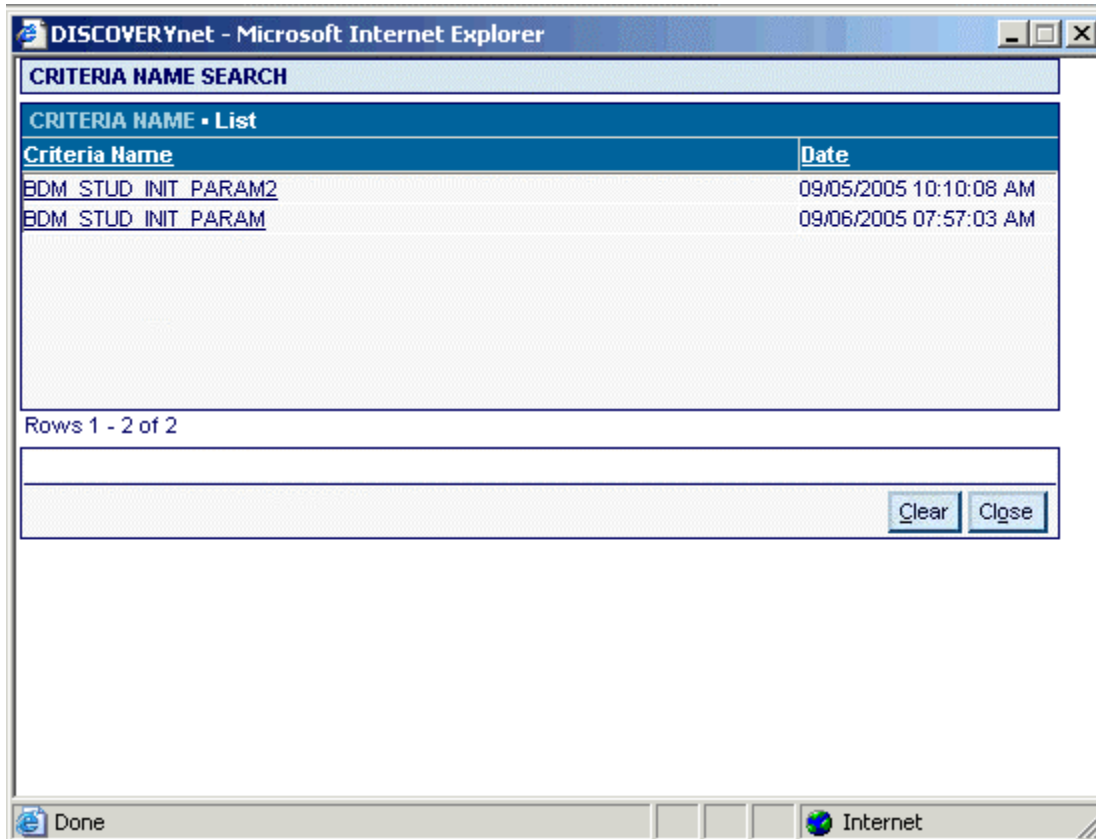- By double-clicking the batch criteria record you want to select.

Figure 9.1 Criteria Name Search window

10   Duplicate Names Search (Contacts)

The Duplicate Names window displays all persons having the same last name and first name as the newly entered contact in Demographics > Contacts page. It details the last name, first name, middle name, address, person ID, email address and phone number of the person, and the type of the record. You may also distinguish if the name is a primary name or an alternate name for the person. Clicking the column header link sorts displayed records by the name of the link clicked. For example, clicking Person ID column header link sorts displayed records by person ID.

You may select a record and display the values on the corresponding fields in the parent page by doing any of the following:

- By clicking the Last Name, First Name link on the first column of the record you want to select.

- By double-clicking the record you want to select.

Figure 10.1 Duplicate Names (Contacts) window

10.1 Ok

Clicking [OK] allows you to create a new contact record of the student with the same last name and first name as the existing person records.

10.2 Cancel

Clicking [CANCEL] closes the Duplicate Names window and returns to Contacts page to allow you to specify another contact.

11 Duplicate Names Search (Primary Info)

The Duplicate Names window displays all students having the same last name, first name, birthday, and gender as the newly entered student in Demographics > Primary Info page. It details the last name, first name, middle name, address, ID, email address and phone number of the student, and the type of the student record. You may also distinguish if the name is the student's primary name or an alternate name for the student. Clicking the column header link sorts displayed records by the name of the link clicked. For example, clicking Student ID column header link sorts displayed records by student ID.

You may select a student record and display the values on the corresponding fields in the parent page by clicking the Last Name, First Name link on the first column of the student record you want to select. Selecting a student record displays 'Discard changes?' to confirm if you want to replace of the newly entered student record with the existing record. Clicking [OK] reloads the Primary Info page with the corresponding student record you selected without saving the new record you created. Clicking [CANCEL] retains the new student record on the page.

Figure 11.1 Duplicate Names (Priimary Info) window

11.1 Ok

Clicking [OK] allows you to continue saving the entered information on the new student record. For existing student records, clicking [OK] posts the modifications made on the active student in the page.

11.2 Cancel

Clicking [CANCEL] closes the Duplicate Names window and returns to the Primary Info page without saving the new student's information.

12 Graduation Requirements

The Graduation Requirements window allows you to view and specify graduation requirements for a course section of the student taken from other schools. This window is available in Transfer > Mass Update Transfer Course page.
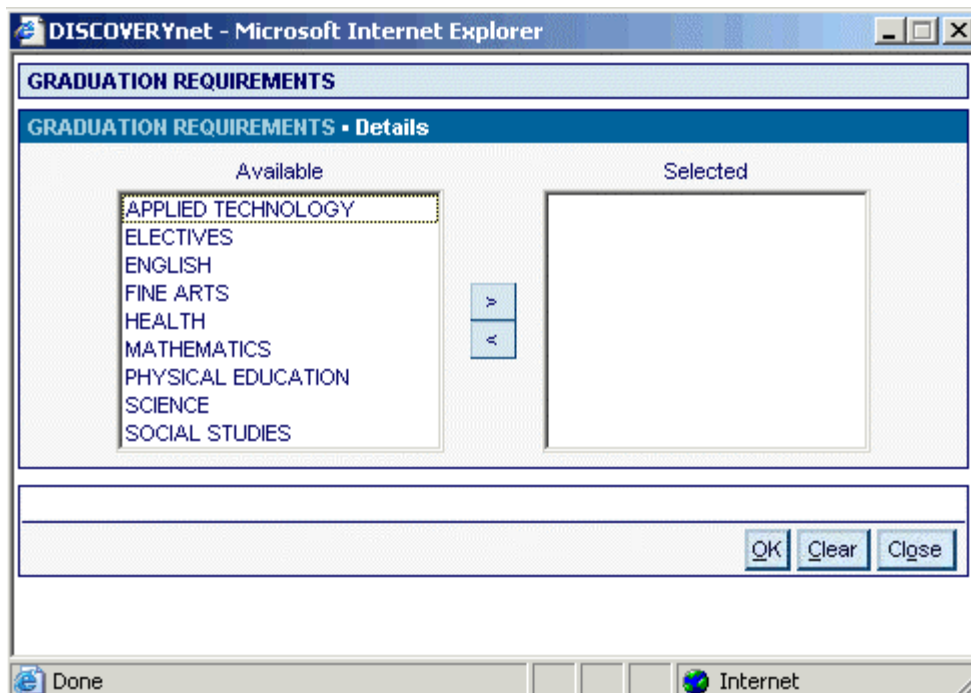
Figure 12.1 Graduation Requirements window

12.1　Ok

Clicking [OK] temporarily assign the selected graduation requirements for the transfer course.

13　Graduation Requirements

The Graduation Requirements window allows you to view all graduation requirements for a course section of the student. This window is available in Transcript > View All > Courses page.
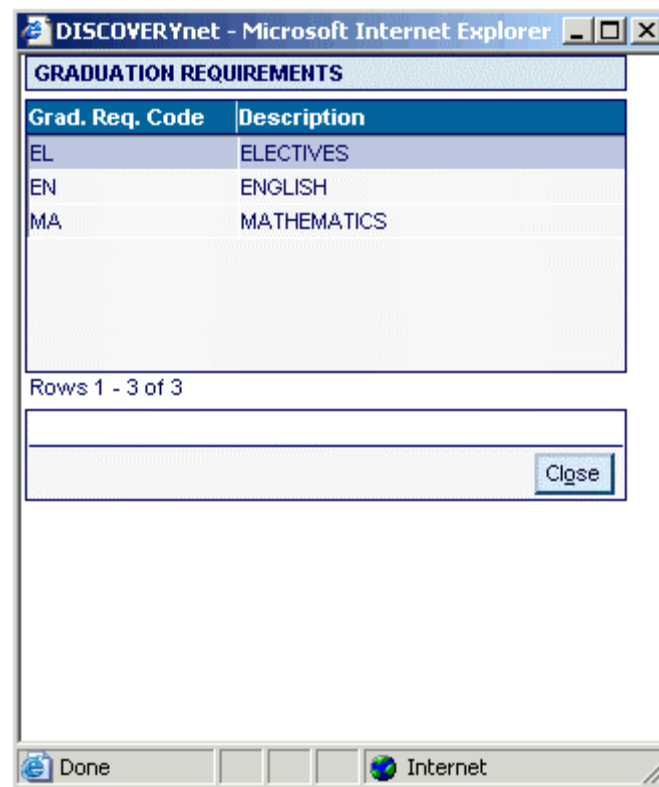
Figure 13.1 Graduation Requirements window

14 Menu Items Preview

The Menu Items Preview window displays the tree list view of the menu items included in the system. It details the menu items with corresponding node sequence.
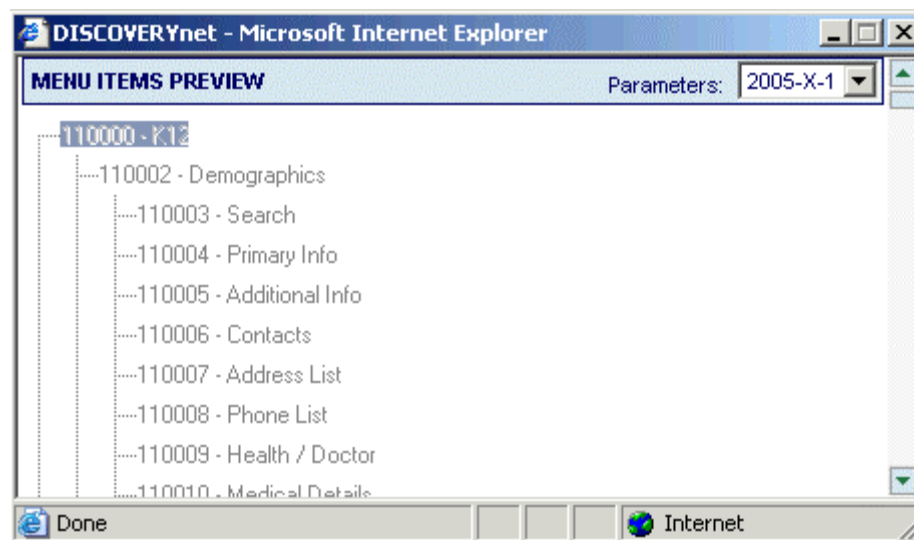

Figure 14.1 Menu Items Preview window

15   Menu Items Search

The Menu Items Search window allows you to locate all available menu items in the application. It details the menu ID, description, page name, and URL. You may locate menu items records by specifying menu ID or description of the menu item record to be located. Clicking the column header link sorts displayed records by the name of the link clicked. For example, clicking Page Name column header link sorts displayed records by page name.

You may select a menu item record and display the values on the corresponding fields in the parent page by doing any of the following:

- By clicking the ID link on the first column of the record you want to select.

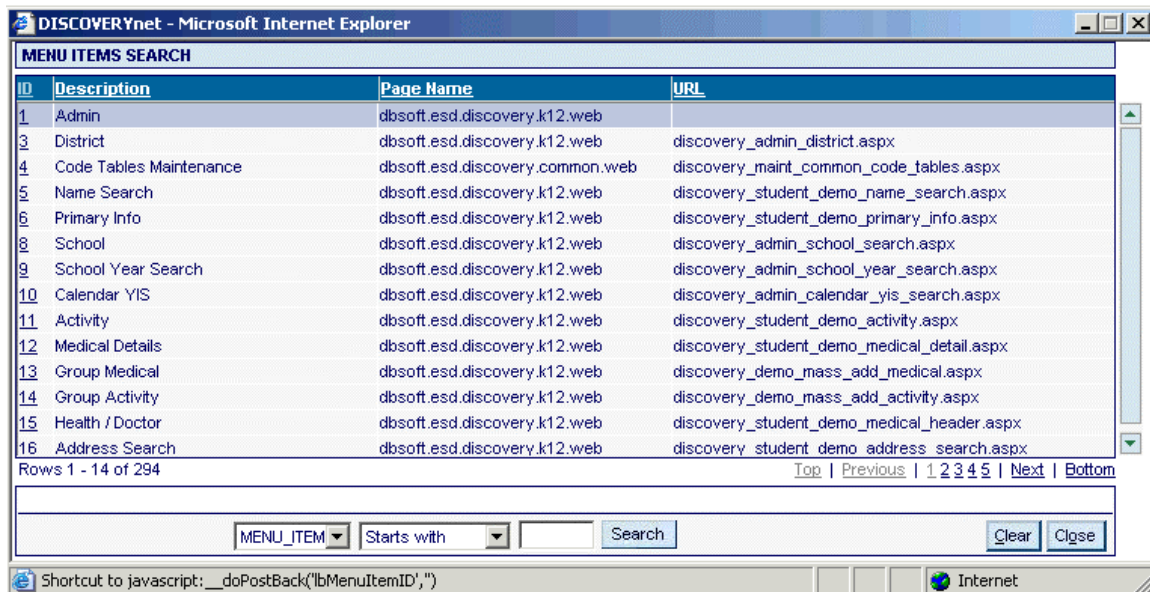- By double-clicking the menu item record you want to select.

Figure 15.1 Menu Items Search window

15.1   Search

Click [SEARCH] to locate menu item records that match the criteria specified.

16   Notes

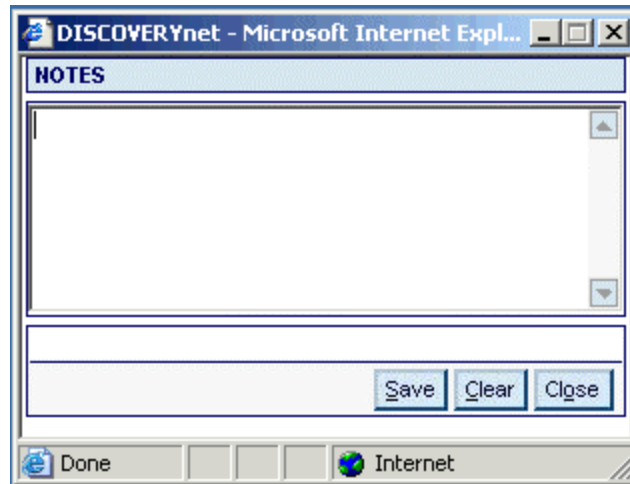The Notes window allows you to add and edit additional information or remarks about a record.

Figure 16.1 Notes window

16.1   Save

Clicking [SAVE] temporarily saves the additional notes of a record.

17   Person Search

The Person Search window allows you to locate all persons that match the criteria specified. This window details the ID, type, first name, and last name of all the persons in the database.

This window consists of two sections: Search Criteria and Search Results sections.

Figure 17.1 Person Search window

17.1   Search Criteria

The Search Criteria section allows you to specify criteria needed to locate existing person records from the database.

17.1.1 First Name

Indicates the first name of the person to be located.

17.1.2 Last Name

Indicates the last name of the person to be located.

17.2   Search Result

The Search Result section details the ID, type, first name, and last name of the persons that match the criteria specified. Clicking the column header link sorts displayed records by the name of the link clicked. For example, clicking Person ID column header link sorts displayed records by person ID.

You may select a person record and display it on the corresponding field in the parent page by doing any of the following:

- By clicking the Person ID link on the first column of the person record you want to select.

- By double-clicking the person record you want to select.

17.3   Search
Click [SEARCH] to locate person records that match the criteria specified.

18   Person ID Search

The Person ID Search window allows you to locate all persons that match the criteria specified. It details ID, first name, and last name of the person to be located.

This window consists of two sections: Search Criteria and Search Results sections.

Figure 18.1 Person ID Search window

18.1   Search Criteria

The Search Criteria section allows you to specify criteria needed to locate existing person records from the database.

18.1.1   Option

An option button that indicates the criteria to be used in locating person records. Options are 'Last Name' and 'First Name'. Selecting 'Last Name' allows you to specify the last name of the person to be located. While selecting 'First Name' allows you to specify the first name of the person to be located.

18.1.2   Name

Indicates the name of the person to be located. You must specify a name before searching. Otherwise, the page displays "Name is required."

18.2   Search Result

The Search Result section details the ID, first name, and last name of the persons that match the criteria specified. Clicking the column header link sorts displayed records by the name of the link clicked. For example, clicking Person ID column header link sorts displayed records by person ID.

You may select a person record and display it on the corresponding field in the parent page by doing any of the following:

- By clicking the Person ID link on the first column of the person record you want to select.

- By double-clicking the person record you want to select.

18.3   Search

Click [SEARCH] to locate person records that match the criteria specified.

19   Phone Reorder

The Phone Reorder window displays all the available phone numbers of the persons related to the student. This window allows you to modify the order of the phone records. It details the phone type and the corresponding phone number of the person.
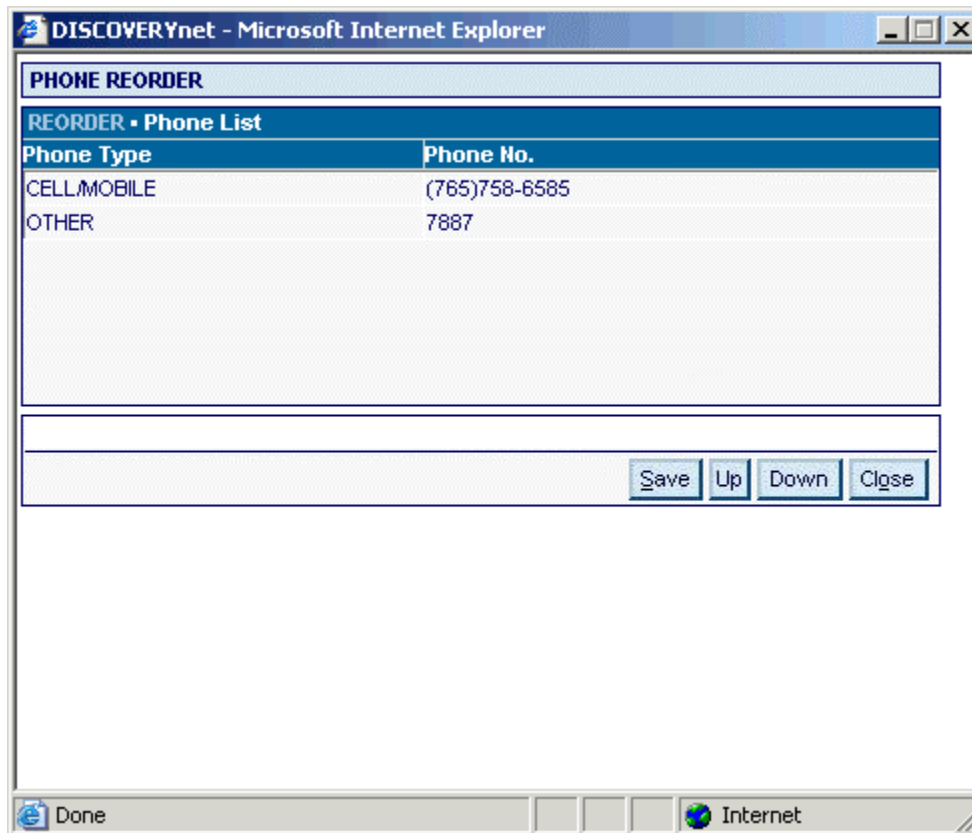
Figure 19.1 Phone Reorder window

19.1 Save
Click [SAVE] to post modifications made on the order of phone records.

19.2 Up
Click [UP] to move the phone record one step up from its previous location.

19.3 Down
Click [Down] to move the move record one step down from its original position.

20 Picture
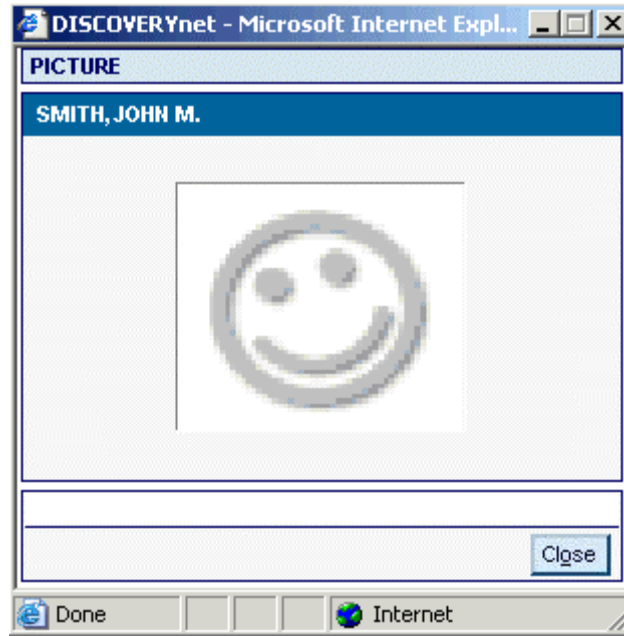
The Picture window displays the picture of the student.

Figure 20.1 Picture window

21   Report Search

The Report Search window displays a list of all generated reports for a particular batch process. It details the batch queue ID, code of the report and the date when the report is generated. Clicking the column header link sorts displayed records by the name of the link clicked. For example, clicking Queue ID column header link sorts displayed records by queue ID. You may open the report by clicking the Report Code link on the second column of the report record you want to select.
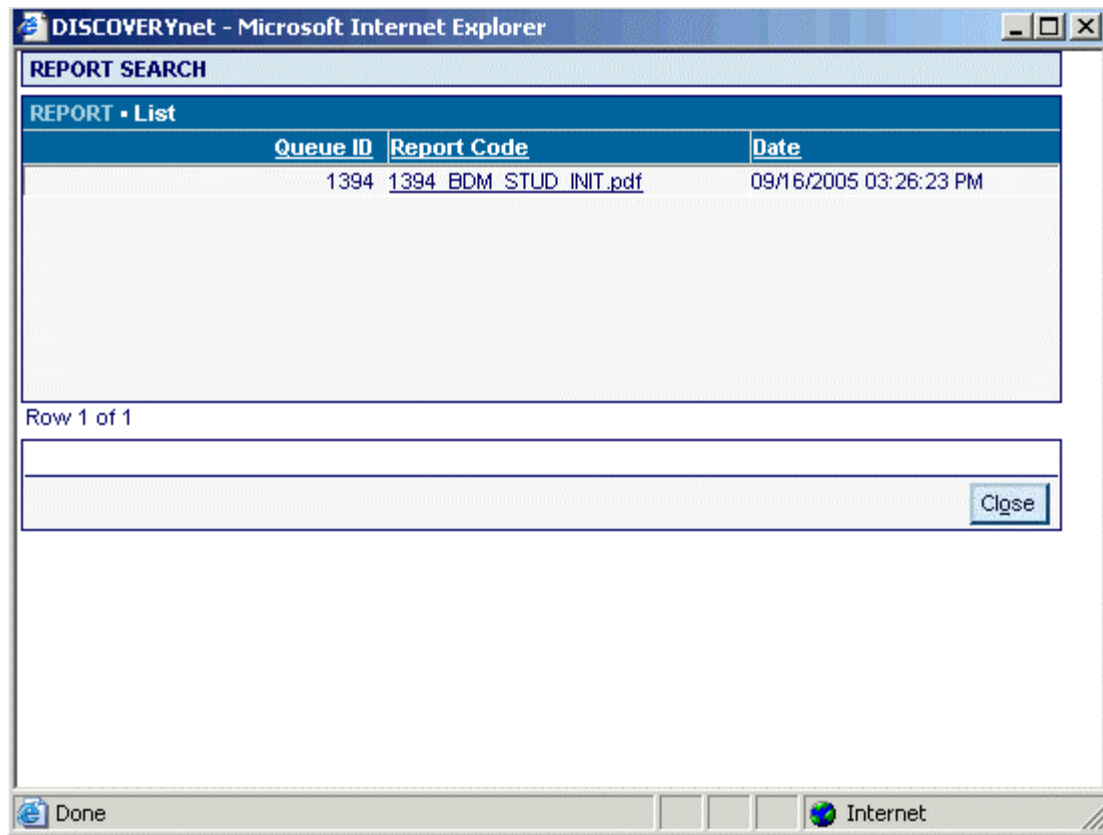
Figure 21.1 Report Search window

22 Room Search

The Room Search window allows you to locate all available rooms in the logon school.

Figure 22.1 Room Search

22.1 Search Criteria

The Search Criteria section allows you to specify criteria needed to locate existing room records from the database.

22.1.1 Option

An option button that indicates the criteria to be used in locating room records. Options are 'Room Key ID' and 'Description'. Selecting 'Room Key ID' allows you to specify the key ID of the room to be located. While selecting 'Description' allows you to specify the description or name of the room to be located.

22.1.2 Room

Indicates value of the criteria selected to locate a room record. You must specify a value before searching. Otherwise, the page displays "Room is required."

22.2   Search Result

The Search Result section details the room key ID and description of the rooms that match the criteria specified. Clicking the column header link sorts displayed records by the name of the link clicked. For example, clicking Description column header link sorts displayed records by description.

You may select a room record and display it on the corresponding field in the parent page by doing any of the following:

- By clicking the Room ID link on the first column of the room record you want to select.

- By double-clicking the room record you want to select.

22.3   Search

Click [SEARCH] to locate room records that match the criteria specified.

23   Room ID Search

The Room ID Search allows you to locate and select a room record that matches the criteria specified. It details ID, description, and type of the room to be located.

This window consists of two sections: Search Criteria and Search Results sections.

Figure 23.1 Room ID Search

23.1 Search Criteria

The Search Criteria section allows you to specify criteria needed to locate existing room records from the database.

23.1.1 Option

An option button that indicates the criteria to be used in locating room records. Options are 'Room ID', 'Description', and 'Room Type Code'. Selecting 'Room ID' allows you to specify the ID of the room to be located. Selecting 'Description' allows you to specify the description or name of the room to be located. While selecting 'Room Type Code' allows you to specify the type of the room to be located.

23.1.2 Room

Indicates value of the criteria selected to locate a room record. You must specify a value before searching. Otherwise, the page displays "Room is required."

23.2 Search Result

The Search Result section details the room ID, description, and type of the rooms that match the criteria specified. Clicking the column header link sorts displayed records by the name of the link clicked. For example, clicking Description column header link sorts displayed records by description.

You may select a room record and display it on the corresponding field in the parent page by doing any of the following:

- By clicking the Room ID link on the first column of the room record you want to select.

- By double-clicking the room record you want to select.

23.3 Search

Click [SEARCH] to locate room records that match the criteria specified.

24 Room Key ID Search

The Room Key ID Search window allows you to locate and select a room record that matches the criteria specified. It details key ID, ID, description, and type of the room record to be located.

This window consists of two sections: Search Criteria and Search Results sections.

Figure 24.1 Room Key ID Search window

24.1 Search Criteria

The Search Criteria section allows you to specify criteria needed to locate existing room records from the database.

24.1.1 Option

An option button that indicates the criteria to be used in locating room records. Options are 'Room Key ID', 'Room ID', 'Description', and 'Room Type Code'. Selecting 'Room Key ID' allows you to specify the key ID of the room to be located. Selecting 'Room ID' allows you to specify the ID of the room to be located. Selecting 'Description' allows you to specify the description or name of the room to be located. While selecting 'Room Type Code' allows you to specify the type of the room to be located.

24.1.2 Room

Indicates value of the criteria selected to locate a room record. You must specify a value before searching. Otherwise, the page displays "Room is required."

24.2   Search Result

The Search Result section details the room key ID, room ID, description, and type code of the rooms that match the criteria specified. Clicking the column header link sorts displayed records by the name of the link clicked. For example, clicking Description column header link sorts displayed records by description.

You may select a room record and display it on the corresponding field in the parent page by doing any of the following:

- By clicking the Room Key ID link on the first column of the room record you want to select.

- By double-clicking the room record you want to select.

24.3   Search

Click [SEARCH] to locate room records that match the criteria specified.

25   Status Search

The Status Search window displays the status of the batch job while it is being processed. It details the queue ID, status, description and date for each status of the batch job. Clicking the column header link sorts displayed records by the name of the link clicked. For example, clicking the Description column header link sorts displayed records by Description.
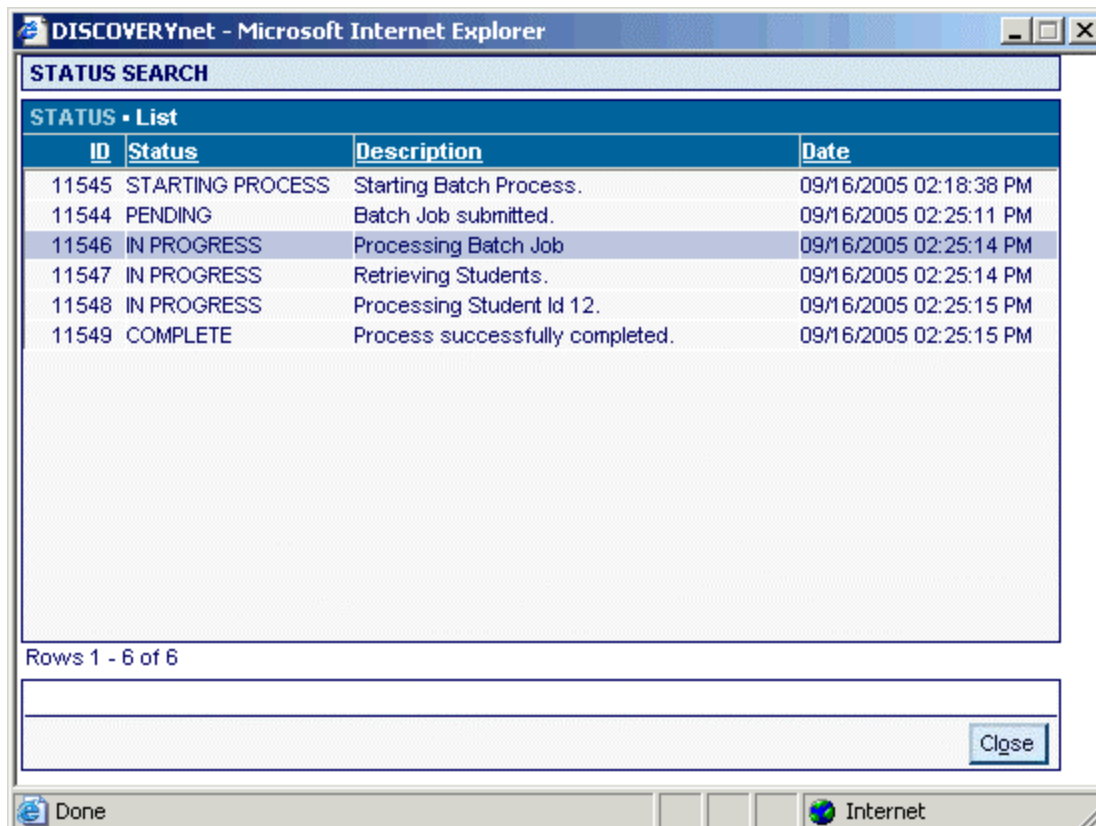
Figure 25.1 Status Search window

26   Student Search

The Student Search window allows you to locate all students that match the criteria specified. It details ID and name of the student to be located. Only enrolled students on the logon school, school year, track and term can be located.

This window consists of two sections: Search Criteria and Search Results sections.

Figure 26.1 Student Search window

26.1 Search Criteria

The Search Criteria section allows you to specify criteria needed to locate existing student records from the database.

26.1.1 Last Name

Indicates the last name of the student to be located.

26.1.2 First Name

Indicates the first name of the student to be located.

26.1.3 Student ID

Indicates the unique identification number assigned to the student to be located.

26.1.4 Student SSN

Indicates the social security number of the student to be located.

26.1.5 Gender

A dropdown list box that indicates the gender of the student to be located. If you want to locate student records regardless of gender, select "ALL' before searching.

26.1.6 Search using Alternate Names

A checkbox that indicates whether only student's alternate names are to be located or not. Selecting this locates for all alternate names of students that match the criteria specified.

26.2 Search Result

The Search Result section details the ID and name of the student records satisfying the criteria specified. Clicking the column header in this section sorts the displayed records by the name of the link clicked. For example, clicking the Student Name column header link sorts display records by student name.

You may select a student record display it on the corresponding field in the parent page by doing any of the following:

- By clicking the Student ID link on the first column of the room record you want to select.

- By double-clicking the student record you want to select.

26.3 Search

Click [SEARCH] to locate students that match the criteria specified.

27   Teacher Search

The Teacher Search window displays all teachers in the log on school and school year. This window opens when you clicked on [PRIMARY TEACHER] or [SECONDARY TEACHER] button in Special Services > Program List page. This window details the person ID and name of the teacher to be selected. Clicking the column header link sorts displayed records by the name of the link clicked. For example, clicking the Person ID column header link sorts displayed records by person ID.
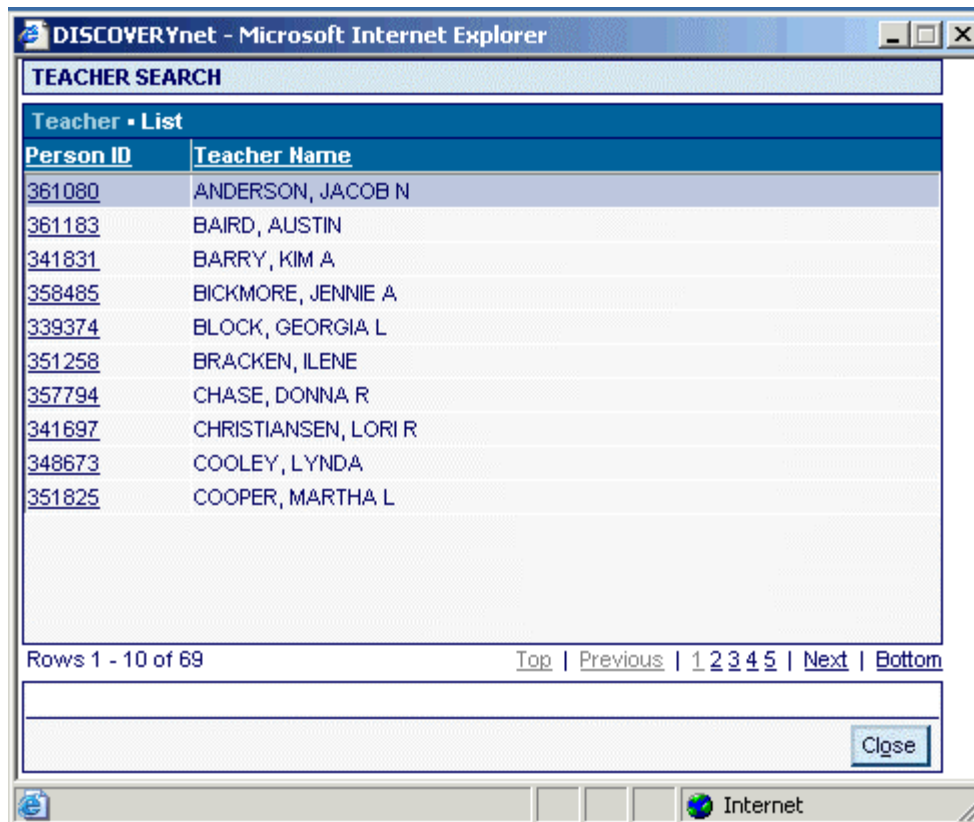
Figure 27.1 Teacher Search window

28   Teacher Name Search

The Teacher Search window locates all available teachers in the logon school and school year that match the criteria specified. Clicking the column header link sorts displayed records by the name of the link clicked. For example, clicking the Person ID column header link sorts displayed records by person ID.

This window consists of two sections: Search Criteria and Search Results sections.

Figure 28.1 Teacher Name Search window

28.1   Search Criteria

The Search Criteria section allows you to specify criteria needed to locate existing teacher records from the database.

28.1.1   Option

An option button that indicates the criteria to be used in locating teacher records. Options are 'Last Name' and 'First Name'. Selecting 'Last Name' allows you to specify the last name of the teacher to be located. While selecting 'First Name' allows you to specify the first name of the teacher to be located.

28.1.2   Name

Indicates the name of the teacher to be located. You must specify a name before searching. Otherwise, the page displays "Name is required."

28.2   Search Result
The Search Result section details the teacher ID, last name, and first name of the teacher records satisfying the criteria specified. Clicking the column header link sorts displayed records by the name of the link clicked. For example, clicking Last Name column header link sorts displayed records by last name.

You may select a teacher record display it on the corresponding field in the parent page by doing any of the following:

- By clicking the Teacher ID link on the first column of the teacher record you want to select.

- By double-clicking the teacher record you want to select.

28.3   Search
Click [SEARCH] to locate teachers that match the criteria specified.

29   Test Code Search

The Test Code Search window locates all available test records that match the criteria specified. Clicking the column header link sorts displayed records by the name of the link clicked. For example, clicking the Test Code column header link sorts displayed records by test code.

This window consists of two sections: Search Criteria and Search Results sections.

Figure 29.1 Test Code Search window

29.1   Search Criteria

The Search Criteria section allows you to specify criteria needed to locate existing test code records from the database.

29.1.1 Test Code

Indicates the code of the test record to be located.

29.1.2 Description

Indicates the name or description of the test record to be located.

29.1.3 Test Type

Indicates the type of the test record to be located.

29.2   Search Result
The Search Result section details the code and description of the test records satisfying the criteria specified. Clicking the column header link sorts displayed records by the name of the link clicked. For example, clicking Description column header link sorts displayed records by description.

You may select a test record display it on the corresponding field in the parent page by doing any of the following:

- By clicking the Test Code link on the first column of the test record you want to select.

- By double-clicking the test record you want to select.

29.3   Search
Click [SEARCH] to locate test records that match the criteria specified.

30   School Access

The School Access window allows you to view and specify the schools you want o have access on. The selected schools in this page are the only schools to be displayed in the School dropdown list box when you log on to the system. This window is available in System Administration > User Maintenance page.
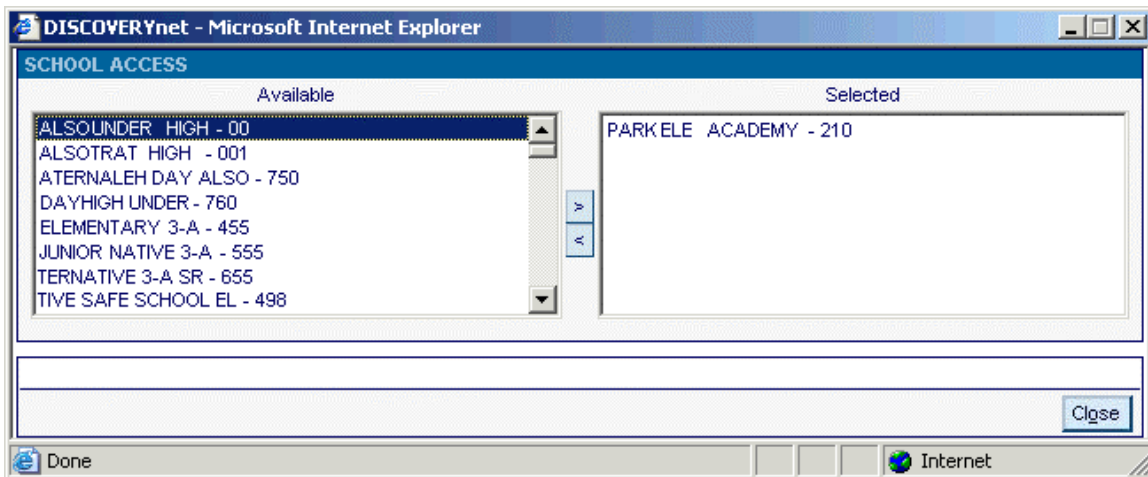

Figure 30.1 School Access window